



TOGETHER WE CAN

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BARTLESVILLECF.ORG

2021 Year-End Giving Deadlines

We are here to help achieve your year-end giving goals and these deadlines will help us work together! Please contact our office if you have any questions or concerns.

Check or Stock Certificate

Postmark on or before 12/31/2021

Special Securities

Deadline: 12/6/2021

Call our office if you need instructions for stock transfers

Stock Transfers

Deadline: 12/7/2021

Stock transfers for invested accounts should be deposited to our broker account no later than 12/7/2021. The stock will then be sold and transferred to the correct account.

Grant Recommendations

Deadline: 12/6/2021

Due to high volume, grants requested after this date might not reach their destination by the close of the year.

Addition to Funds to be invested

Deadline: 12/13/2021

Cash or check contributions that are to be invested need to be in our office no later than 12/13/2021.

Under IRS Rules

IRS rules prohibits IRAs from making charitable contributions to donor advised funds. Please do not send your IRA distribution to your fund as that may be treated as a taxable distribution to you.